Assure&go is a very convenient and efficient sales tool with an intuitive and simple process - a few steps that can get you there in no time.

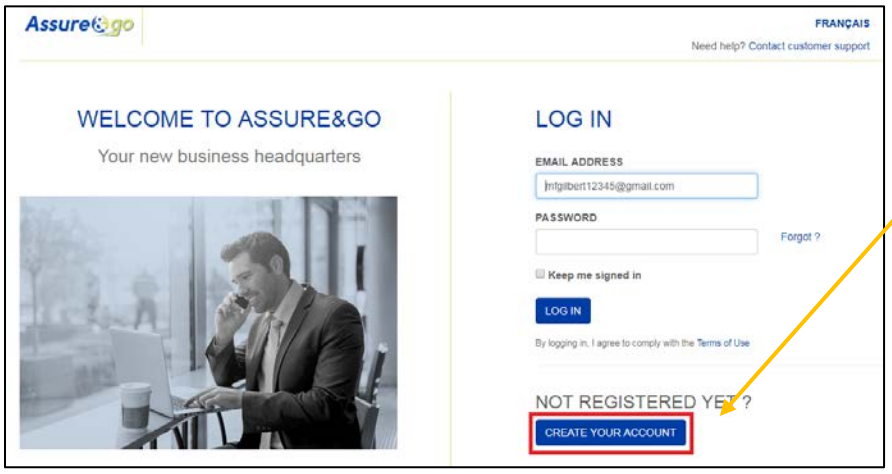
## How to create an account on Assure&go Demo

Prerequisites to create an account on Assure&go demo: an email address and a cell phone.

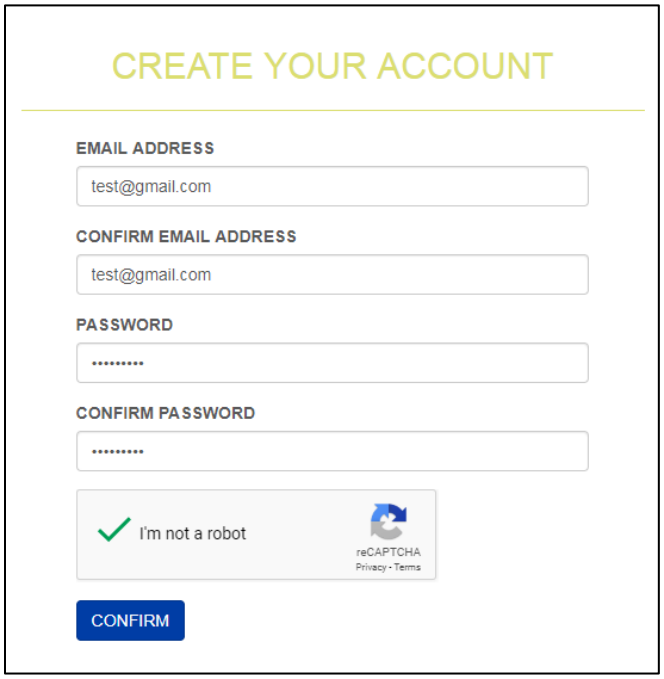
**https://ago.accp.iaexcellencetest.com/**

Use the link to access the demo site.

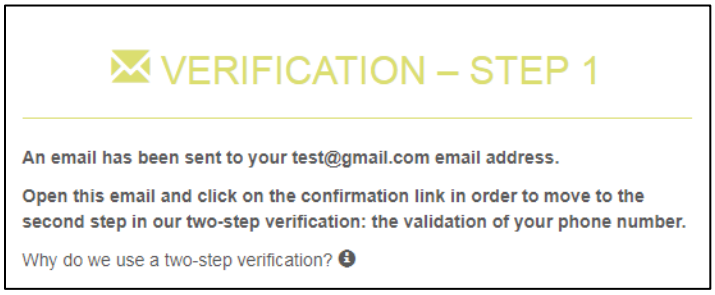
Click on “Log in” or “Get started now” to go to the login screen.



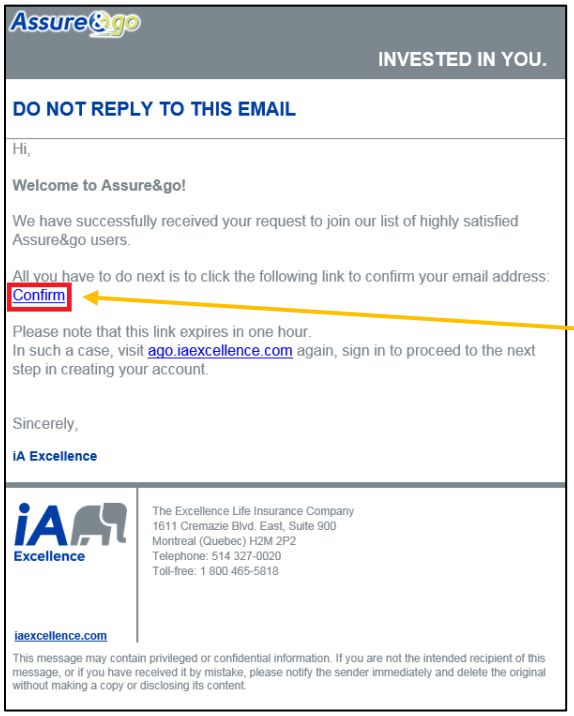

Click on “Create your account”.



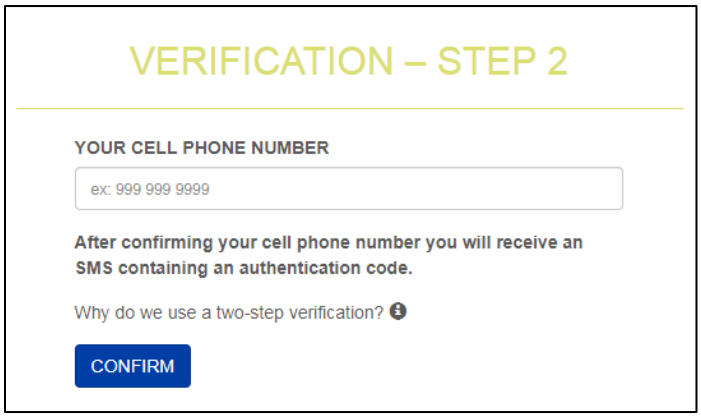

Enter your email address and your password twice. Confirm that you are not a robot by validating the images then click on “Confirm”.



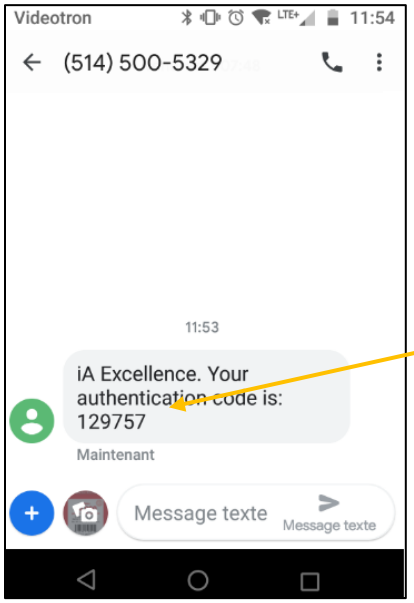

You have now reached step 1 of the verification process: an email will be sent to you. If you don’t receive it within seconds, check your junk mail.



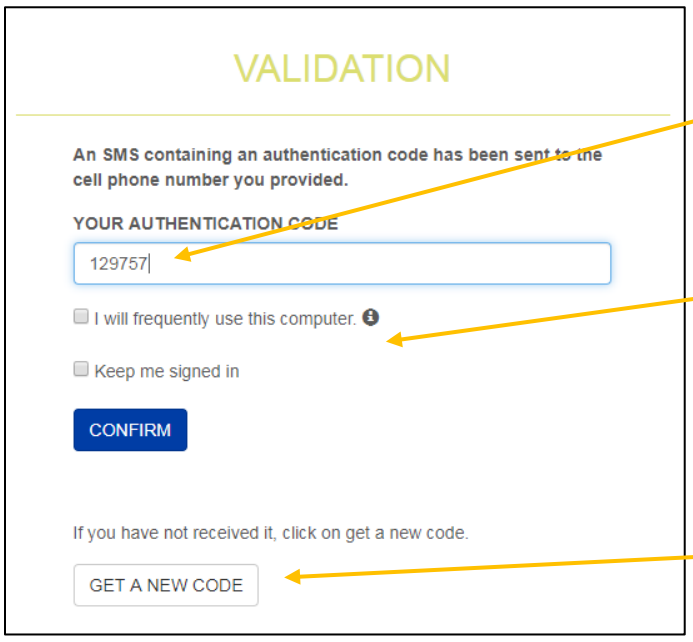

Open the email from iA Excellence and click on “Confirm”.




You are now at step 2 of the verification process. Enter your cell phone number.



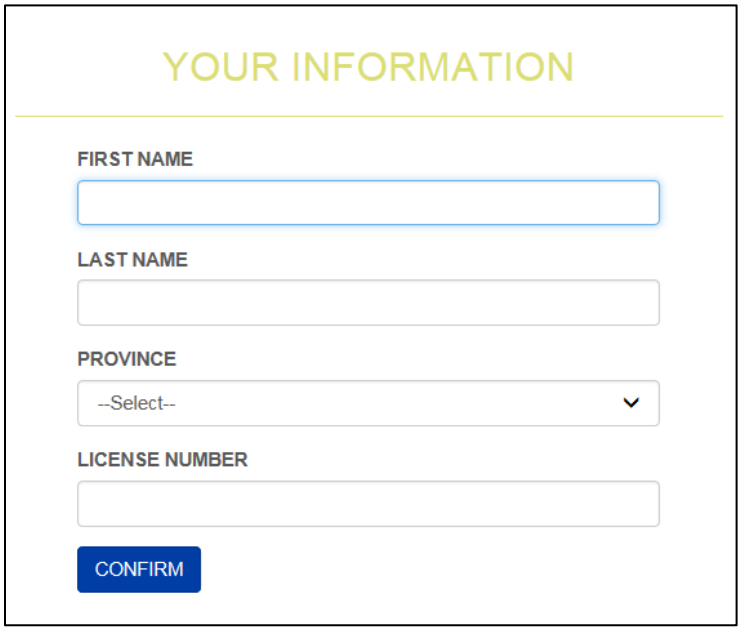

A six-digit authentication code will be texted to the given phone number for validation.



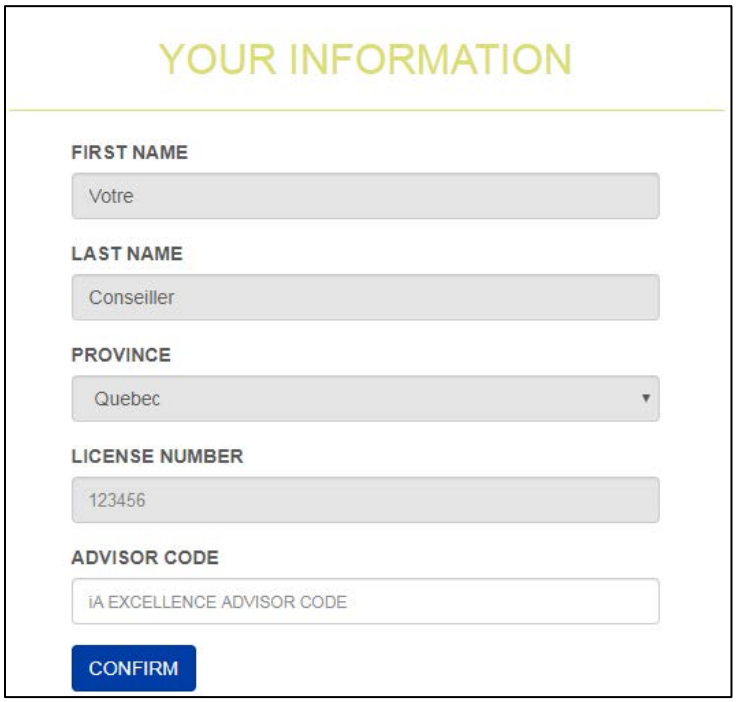

Enter the six-digit code and click on “Confirm”.

We advise you to check both boxes “I will frequently use this computer” and “Keep me signed in” to save time whenever you log in.

If you don’t receive a code, click on “Get a new code”.



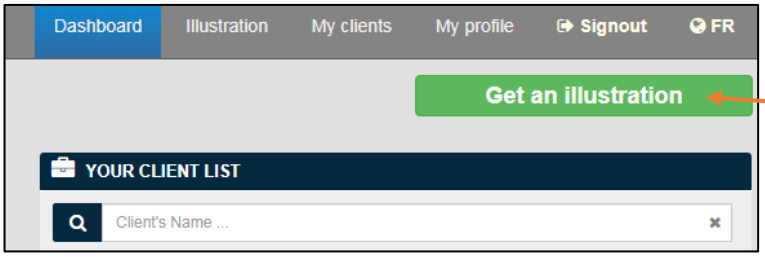

Enter your information: first name, last name, province and the following license number (123456), then click on “Confirm”.



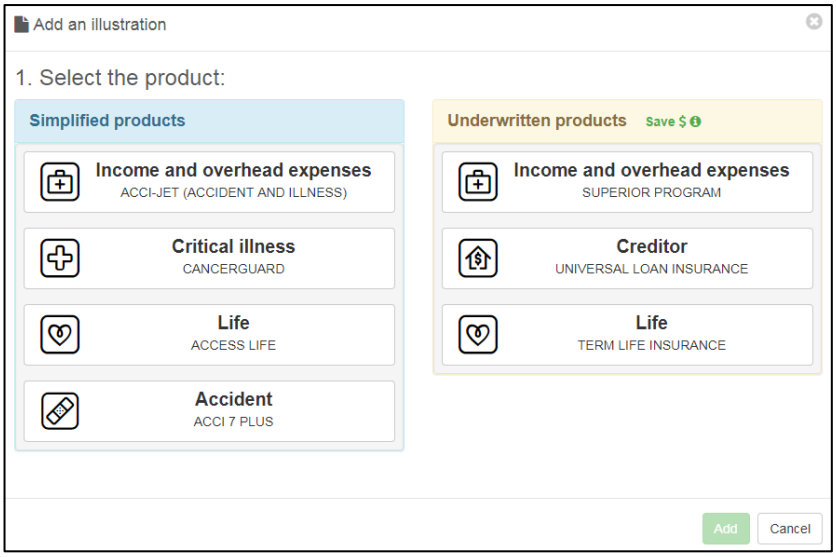

Enter the fake advisor code (19054) and click on “Confirm”.

You’re all set! Your information can be found and edited in the “My profile” section.

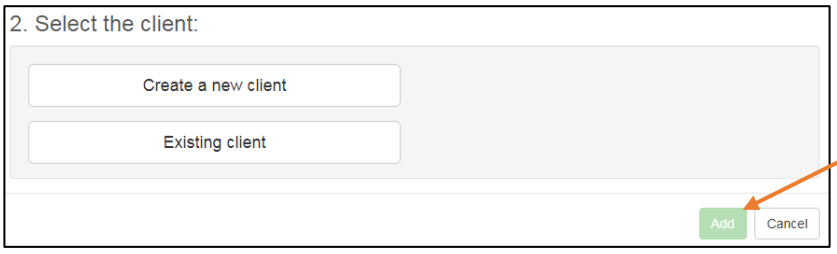
# How to complete applications using Assure&go




To start, click on “Get an illustration”.




Select the product from our seven available options.




Select the client (new or existing) and click on “Add”.

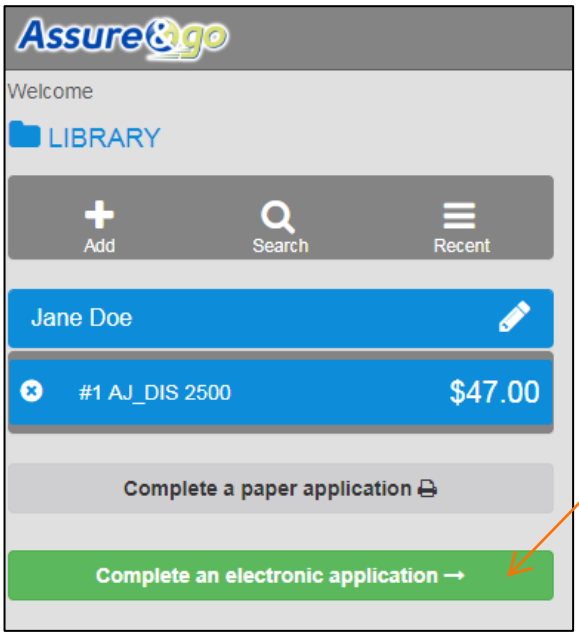
You are now all set to proceed to creating an illustration!

The process is very clear and spontaneous. If you ever leave something out or make a mistake, the system will automatically alert you in red colour or with an error message.

Here are the steps required to complete an illustration:

Enter the basic client information (name, gender, date of birth, etc.).

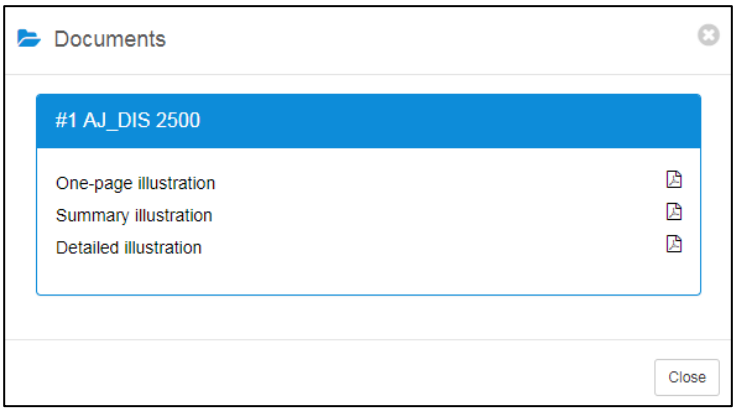
Complete the “Coverage” section which includes all available options depending on the product of choice.




When the “Coverage” section is completed, click on “Complete an electronic application”.

You will have the choice of three illustration formats:

- One-page
- Summary (+ cover page and product description)
- Detailed (+limitations, exclusions and definitions)




Save the illustration, print and enclose with the paper application.

## Keep in mind...

**Underwritten products:** Needed medical requirements, if any, will be listed at the end of the illustration.

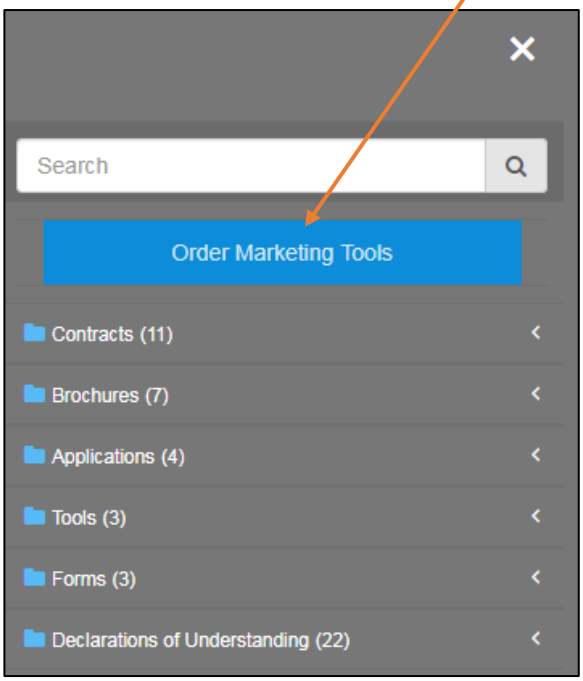
**CancerGuard and Access Life:** Rates will be accessible only after providing answers to eligibility questions since rates vary depending on each client's health status.

**Access Life:** Available electronically on Assure&go only.

**Acci 7 PLUS:** Only the one-page illustration is available.

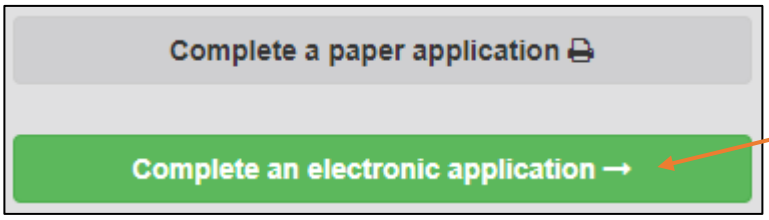
All documentation related to sales (including applications, brochures, contract specimens, forms, diverse tools, etc.) are always available through our "Library".

You can also order all your marketing documentation through the "Library".




Note : illustration can be prepared and printed before visiting your client if Internet access is not guaranteed.

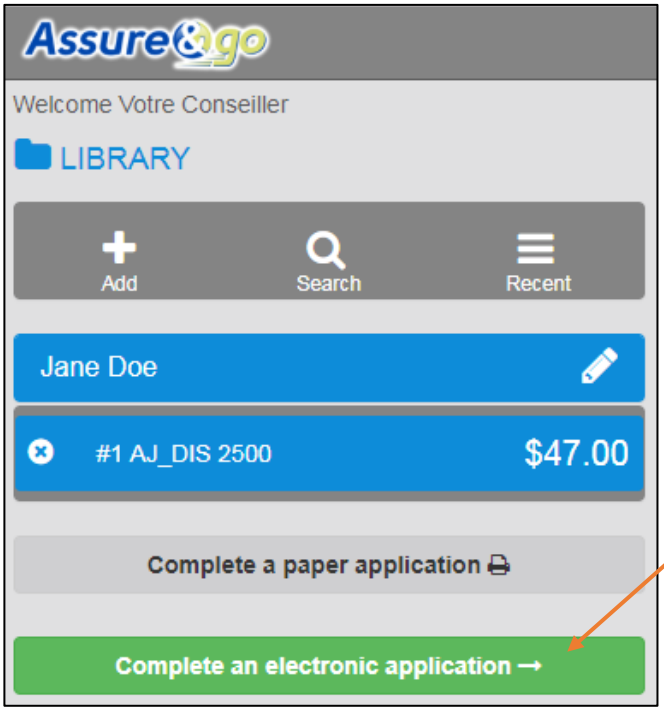
## Time-saving tips for you and your client




Valuable advice: Opt for completing an electronic application rather than a paper one and you will see how easily you will fall in love with using Assure&go!

# How to complete electronic applications on Assure&go

Once you have completed the illustration, follow the steps below:




Click on “Complete an electronic application”.

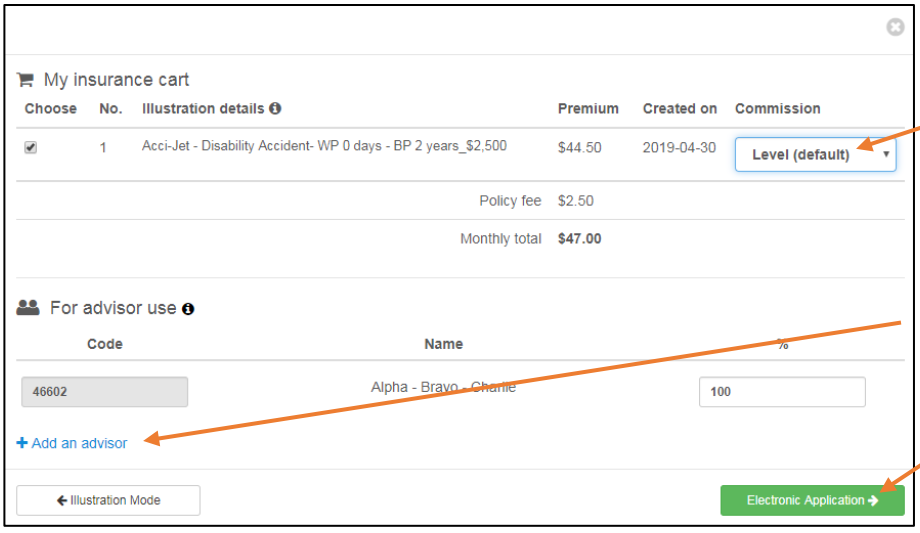


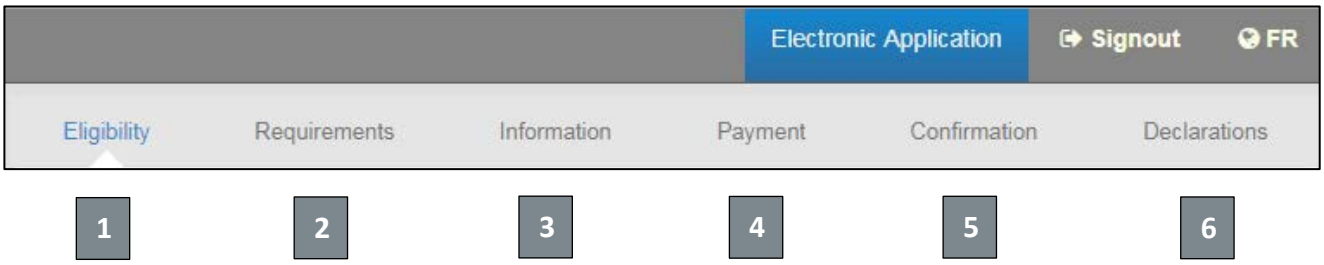

Illustration details show in the cart. If required, select the commission type.

If you want to share the commission, click on “Add an advisor”.

Click on “Electronic Application”.

You now have **five easy-to-complete steps** for simplified issue products…

… or **six steps** for underwritten products.




"Eligibility" step: Eligibility questions to answer with your client or an opportunity to review and confirm the answers provided in the illustration.

"Requirements" step: Details related to the telephone interview and the medical requirements to order.

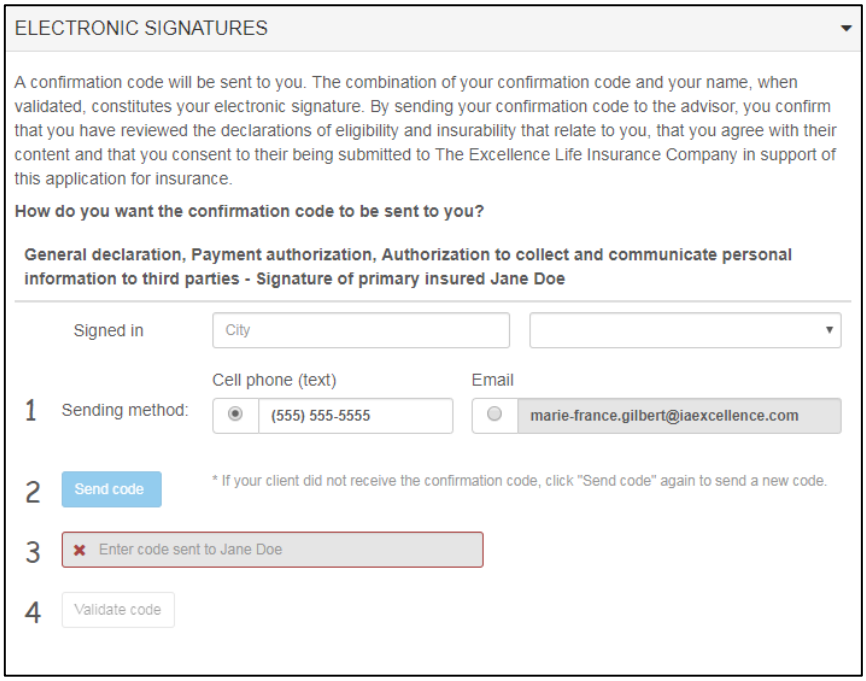
"Information" step: Addition of personal and/or professional information.

"Payment" step: Information on type of payor, method of payment, pre-authorized debit and interim insurance agreement, if applicable.

"Confirmation" step: Important step to revise all provided information. After this step, there is no possibility to make any additional changes.

"Declarations" step: Insured's and policyholder's general declarations, pre-authorized debit agreement, authorization to collect and communicate personal information to third parties and advisor's declaration.

To finalize the process, the only thing left is the electronic signature of your client by sending a confirmation code either to a cell phone or an email. Once the code is entered, you just need to click on «Validate code». The electronic application is then automatically sent to our offices and will be treated at the earliest possible date.




The electronic application in PDF format will be accessible for you to save or print.